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**CBER**

# Ohio Department of Agriculture

## Meat Buyers Survey Final Report

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## I. INTRODUCTION and METHODOLOGY

The Center for Business and Economic Research as part of a larger study on the market potential of Ohio Born and Raised Beef conducted one-on-one telephone interviews with 35 meat buyers for independent grocers in the State of Ohio.

The objectives of the interviews were to gain detailed information on:

- General Meat Buying Trends
- Overall interest in a program focused on Ohio Born and Raised Beef
- Standards/Criteria that would be important for Ohio Born and Raised Beef to Meet
- Specific Product Delivery Issues
- Marketing Requirements

The Ohio Department of Agriculture provided a list of 90 Meat Buyers for Independent grocers/meat markets in Ohio. CBER called all 90 in the period of March-April 2002 and was able to obtain interviews with 35.

The phone interviews were conducted using a discussion guide that mixed some closed ended survey questions with more open ended questions that could serve as a basis for discussion (see Appendix for verbatim responses on open ended questions). The interviews were introduced as follows:

*Hi, I'm \_\_\_\_\_ from the Center for Business and Economic Research at the University of Dayton. We are doing some research for the Ohio Department of Agriculture and the Ohio Beef Council on the potential for a line of "Ohio Born and Raised" beef products to be marketed in Ohio retail stores. I want to set up a 1 on 1 interview with you to discuss the strategies you use while making meat purchasing decisions for your store/stores. Additionally, I would like to ask you a few questions related to your possible interest in featuring a product line that promotes "Ohio Born and Raised Beef" in your stores.*

In the following section the results of the interviews are provided in order questions appeared on the discussion guide.

## II. RESULTS

### A. General Industry Trend Questions

#### 1. *Main forces that currently drive or impact meat purchasing decisions*

Respondents were asked, “*What are the main forces that currently drive your meat purchasing decisions?*” They then gave a verbatim response. Some respondents gave more than one response.

**Table 1: Main Forces Driving and Impacting Meat Purchasing Decisions**

<b>Force</b>	<b>Count</b>	<b>%</b>
Price	15	42.9%
Quality	15	42.9%
Consumer Demand	10	28.6%
Customer Service of Supplier	5	14.3%
USDA Choice/Grade	5	14.3%
Freshness	4	11.4%
Raised Locally	3	8.6%
All Natural-No Hormone/Steroid or Antibiotics, Verified	2	5.7%
Angus Beef	2	5.7%
Availability	2	5.7%
Time of Year/Weather	2	5.7%
Total Respondents	35	

- Price and quality are mentioned most often as main forces that drive and impact meat-purchasing decisions (listed 15 times each).
- Consumer demand was also listed frequently (listed 10 times) by respondents.

## 2. Key Characteristics Looked For In Meat Suppliers

Respondents were asked, “In thinking about your meat suppliers, what are the key characteristics you look for in those suppliers?” Respondents then gave a verbatim response. Some respondents gave more than one response.

**Table 2: Key Characteristics of Meat Suppliers**

Characteristic	Count	%
Quality	18	51.4%
Cost/Pricing	13	37.1%
Timeliness/Prompt Delivery	11	31.4%
Reputation/Honesty/Loyalty	7	20.0%
Availability	6	17.1%
Freshness	6	17.1%
Grade	5	14.3%
Reliability/Dependability/Consistency of Supplier	5	14.3%
Customer Service	4	11.4%
Warehouse	2	5.7%
Cleanliness of Trucks	1	2.9%
Follow HACCP program	1	2.9%
Total Respondents	35	

- Quality was the characteristic most frequently listed as a key characteristic of meat suppliers (listed 18 times).
- Cost/Pricing and Timeliness/Prompt Delivery were also frequently listed characteristics looked for in meat suppliers (listed 13 times and 11 times).

## 3. Willing To Purchase More Than One Brand of Beef From A Supplier

Respondents were asked “Are you willing to purchase more than 1 brand of beef from a supplier?” If the respondent answered yes, they were asked to explain.

**Table 3: Respondents Purchasing More Than One Brand From a Supplier**

	Count	%
Yes	29	82.9%
No	6	17.1%
Total	35	100.0%

- Over  $\frac{3}{4}$  of respondents were willing to purchase more than one brand of beef from a supplier.
- Of the 19 respondents who answered yes and provided a specific reason, most said they are willing to purchase more than one brand of beef from a supplier for either of two reasons (or both):
  1. Price Competition (listed 7 times)
  2. They Purchase Different Grade Meat from Different Suppliers (listed 7 times)

## B. Introduction to “Ohio Born and Raised” Idea

### 1. Interest in a program to market “Ohio Born and Raised Beef”

Respondents were given a short description of the proposed “Ohio Born and Raised” program and then asked, “*Would you have a lot of interest, some interest, or no interest in such a program.*”

**Table 4: Interest in “Ohio Born and Raised Program”**

	Count	%
A Lot of Interest	7	20.0%
Some Interest	27	77.1%
No Interest	1	2.9%
Total	35	100.0%

- Over  $\frac{3}{4}$  of respondents answered they would have some interest in such a program.
- Only one respondent had no interest in the program

**Note:** Respondents who answered they had no interest in the program were then asked a different series of questions than respondents who had some or a lot of interest in the program.

## C. General Information Issues

### 1. Information Needed to Consider Starting a Pilot Program of “Ohio Born and Raised”

Respondents were asked, “What information would you need to consider starting a pilot program of “Ohio Born and Raised?” They then gave a verbatim response. Respondents could provide multiple responses.

**Table 5: Information Needed to Consider Starting a Pilot Program of “Ohio Born and Raised”**

Information	Count	%
Quality	12	35.3%
Price	10	29.4%
Documentation of Feeding	7	20.6%
Source and Process Verification	6	17.6%
Delivery and Handling Information (When, How, and What Form)	4	11.8%
Grading	4	11.8%
Type of Beef	4	11.8%
Availability	3	8.8%
General Information About The Program	3	8.8%
Support Ad Programs	3	8.8%
Safety of Product	2	5.9%
Which Companies Supply Beef	2	5.9%
Other	4	11.8%
Already Have A Program	4	11.8%
Total Respondents	34	

- Price and quality information were stated most often as information needed to consider before starting a pilot program.
- Four respondents already have a program.

### 2. Influence of In-Store Marketing Materials in Carrying the Product Line

Respondents were asked “Would having in-store marketing materials, case dividers, and displays already developed and included in the handling of this product line influence their decision to carry the product line?” They were then given the choice of ‘yes’ or ‘no’.

**Table 6: Influence of In-Store Marketing Materials**

	Count	%
Yes	28	82.4%
No	3	8.8%
Maybe	3	8.8%
Total	34	100.0%

- Only three respondents said that In-Store Marketing Materials would not influence their decision in carrying the product line (9%).
- Of those who said yes, responses ranged from “Any support would be great factor in decide to do the campaign, i.e. support of marketing material” to “It would help it move. I would greatly appreciate that.”

### 3. Standards Needed for “Ohio Born and Raised” Beef to Be Considered for Purchase

Respondents were asked “What standards would “Ohio Born and Raised” beef have to meet in order to be considered for purchase?” Because responses were so varied, a table listing the verbatim answers has been included.

**Table 7: Standards Needed for “Ohio Born and Raised” Beef**

Standard
Quality Choice Standards, Higher Grade Beef
Highest Quality, Government Inspected, Quality And Grade
High Grade/High Quality, Prime Grade-High Choice, Antibiotic Free, Feed Be Proven All Vegetarian Feed
At Least Select Grade Prefer Choice
How Are They Fed-Organic, Have No Substitute Grains
Amount Of Time On Feed In Ohio, Quality Of Grade
Fat Quality, Texture- Tough Or Tender
Choice, Grain Fed
Grade Out, Yield Factor-2, Weight Range 600-660
Uses Ohio Beef
The Highest Of Quality, Inspection And Grade On Choice, Reasonable Cost, Availability. Tough Competition But Provide A Good Product Should Have No Problem.
Amount Of Fat, Date Packaged
Prime Beef, Not Choice
Choice Or Higher Quality
Choice, Good Color
Choice Of Prime
Low Price, Availability
Select And Choice- Good Grade And Yield, Fresh, Price
Best Quality
No Less Than Choice
All Be Choice Meat, Box It, Guarantee Availability
Credibility/Trust Of People Who Set Up Program. People Who Promote Program. Feed That Is Given To Animals
People feel comfortable and trust good neighbors and family members. We need to pass that feeling along to the Ohio consumer that she feels she knows where, who, what, and when her beef is coming from. Standards would have to include a consortium of quality members with reasonable guidelines to meet. Our consumer won't budge unless there is something much better for their families. Such as healthy reduced growth stimulants, antibiotics, implants.
Leaner Beef With Marbling, Not A Lot
Upper End Of Choice Grade
Consistent Program, Quality, Color, Texture
The Highest Standard. The USDA Standards, I Would Want To Meet Those Standards.
Would Have To Be Top Choice And Prime Grades. Need To Have Standard In Order To Meet Inspection Needs.
Nothing Less Than Choice Beef, Angus Beef
Competitive Price And Availability
Same Standards As Other Meat
Wholesome, Government Regulated, Consistent Tenderness
Quality - Look, Cut Ability, Customer Preferences
Have To Be Choice Grade 2 Or Higher. Quarter Inch Beef Trim Standard.

- **Quality, grade and freshness are predominant themes throughout the responses.**

#### 4. Importance of Following Criteria for Purchasing “Ohio Born and Raised” Beef

Respondents were asked to rate on a 1 to 10 scale, with 1 being not at all important and 10 being extremely important, if the following criteria had to be met in order to consider “Ohio Born and Raised” beef for purchase. A weighted average (mean) has been provided in the following table to help rank each criterion. There were 34 respondents for this question.

**Table 8: Importance of Criteria for Purchase of “Ohio Born and Raised” Beef**

	Least important					Most important					Mean
	1	2	3	4	5	6	7	8	9	10	
Guaranteed Tender					2		2	7	5	18	9.0
Bacterial Counts	2					1	1	4	4	21	8.9
Consistency of Marbling					1	2	3	7	5	16	8.8
Consistency of External Fat Cover			1		1	1	3	10	8	10	8.4
Animal Handling Criteria	1	1		1	3	3	2	2	3	18	8.1
No Use of Growth Promoters (Hormone Implants)	1	1	2	1	2	5	3	1	2	16	7.6
Process Verification		1			8	2	3	9	1	10	7.5
Source Verification	2				7	2	3	7	1	12	7.5
Names of Participating Producers/Contact Information	1			1	8	3	2	8	1	10	7.4
Uniformity of Portion/ Wholesale Cut Size	2		1		6	1	6	8	1	8	7.2
No Use of Antibiotics in Production	2	2	2	3	3	3	3	3		13	6.8
Availability of Case-Ready Products	9	2	2	3	5	3	1	4	2	3	4.7
Availability of Pre-Cooked Products	11	3	4	1	5	5		4		1	3.8

- Guaranteed tender was the most important criteria with a mean rating of 9.0, while bacterial counts was given a rating of 10 the most times (21).
- **In general, respondents did not regard availability of case-ready and pre-cooked products as important.**

Respondents were then asked to rank each criterion in order of importance. Some respondents rated more than one characteristic with the same number. There were 24 respondents for this question.

**Table 9: Ranking of Each Criterion**

	Number of Times Ranked										Top 3
	1	2	3	4	5	6	7	8	9	10+	
Consistency of Marbling	7	5	4		1				1		16
Guaranteed Tender	6	4	1							1	11
Bacterial Counts	6	2	1								9
No Use of Antibiotics in Production	3	5	1	1							9
Animal Handling Criteria	3	3	2								8
Consistency of External Fat Cover	3	4	1	1				1			8
No Use of Growth Promoters (Hormone Implants)	3	2	2								7
Source Verification	2		3		1	1					5
Process Verification	1	2	1		1		1				4
Uniformity of Portion/ Wholesale Cut Size	1	2	1	2		1				1	4
Names of Participating Producers/Contact Information			2	2	1					1	2
Availability of Case-Ready Products			1		1	1				1	1
Availability of Pre-Cooked Products			1	1	1					2	1

- **Consistency of marbling, guaranteed tender, and bacterial counts were ranked number 1 the most times (7 times, 6 times, 6 times, respectively).**
- Consistency of marbling also was ranked in the top three the most times (16).

Respondents were then asked, “*What other standards would be essential?*”

- Availability of meat (mentioned 4 times) was the only essential standard mentioned more than once.

## Specific Product Delivery Issues

### 1. Preferred Form of “Ohio Born and Raised Products”

Respondents were asked, “*In which form would you primarily prefer this ‘Ohio Born and Raised’ product?*” They were then given the choices of ‘case ready, retail cuts,’ ‘boxed product, wholesale cuts,’ ‘pre-cooked products,’ or ‘halves and quarters (carcasses)’. Some respondents provided multiple answers.

**Table 10: Preferred Form of “Ohio Born and Raised” Products**

Form	Count	%
Boxed Product, Wholesale Cuts	26	76.5%
Halves or Quarters (Carcasses)	14	41.2%
Case Ready Retail Cuts	0	0.0%
Pre-Cooked Products	0	0.0%
Total Respondents	34	

- Over  $\frac{3}{4}$  of respondents preferred boxed product, wholesale cuts.
- No respondents preferred case ready retail cuts or pre-cooked products.
- Six respondents said either boxed product or halves and quarters.

### 2. Weekly Delivery Schedule

Respondents were asked “*What delivery schedules would you require in: ‘How many times a week,’ and ‘How much lead time (in days)?’*” There were 34 responses for both questions.

**Table 11: Required Delivery Schedule (Per Week)**

Delivery Schedule	Count	%
1 time	5	14.7%
1 to 2 times	2	5.9%
2 times	14	41.2%
2 to 3 times	4	11.8%
3 times	6	17.6%
4 times	2	5.9%
5 times	1	2.9%

- Over 91% of respondents would require a delivery schedule of between 1 time to 3 times per week.
- Eighty percent of respondents would require a lead time of three or fewer days.
- The average lead time is 2.6 days.

**Table 12: Required Lead Time (In Days)**

Lead Time	Count	%
1 day	11	31.4%
1 or 2 days	2	5.7%
2 days	3	8.6%
2 or 3 days	5	14.3%
3 days	4	11.4%
3 or 4 days	2	5.7%
5 days	2	5.7%
1 week	3	8.6%
Don't Know	2	8.6%

### 3. *Minimum Order Size*

Respondents were asked, “*What would be your minimum order size or amount?*” Some respondents preferred to talk in dollar terms, some in terms of numbers of head, but most dealt in pounds. There were 29 responses for this question.

**Table 13: Minimum Order Size or Amount**

Size	Count
\$500+	1
\$550 or 376 lbs.	1
\$3,000	1
\$5,000	1
1/2 side/ cattle	1
1 whole cattle	1
2 head	1
2- 3 heads	1
3 head	1
If 100%, 20 head of cattle for one store.	1
200 lbs +	1
300 lbs	2
400 - 500 lbs	1
500 lbs	3
500-1000 lbs.	2
800 - 1000 lbs a week	1
1000 lbs	6
Now-1200, Summer-3600 lbs/week	1
3000 lbs	1
3,000-5,000 lbs per delivery	1

- Twelve of the 29 respondents indicated their minimum order was somewhere between 500 and a 1,000 pounds

#### 4. *Minimum Amount of Beef Required To Make Program Viable.*

Respondents were asked, “*What is the minimum amount of Beef Required for Program to be viable and worth their time?*” There were 34 responses for this question.

**Table 14: Minimum Amount Required**

<b>Amount</b>	<b>Count</b>
\$2,000	1
\$10,000	1
1 side/week	1
1 cattle/week	1
2 head	1
6 cattle/week	1
10 cattle/week	1
12-15 cattle/week	1
20 Head of Cattle	1
100 lbs	2
250 lbs	1
3 cases/week - 300 lbs.	1
400 lbs/week	1
500 lbs/week	1
500 lbs/week	1
800 lbs	1
800 - 1000 lbs the same in the whole case	1
1000 lbs	1
1000 lbs/week	1
1000+ lbs	2
1500-1600 lbs/week	1
3000 lbs/week	1
3000-5000 lbs	1
At least all the primary cuts	1
Full line of product	1
Readily available on 12 month basis	1
Flexible	2
Don't Know	4

- Respondents had a variety of responses, ranging from 100 pounds to 5,000 pounds with a few indicating they would need 12 to 20 head a week.

### 5. Percentage of Stores with Interest in “Ohio Born and Raised” Beef

Respondents were asked “What percent of their stores would have an interest in this product?”

- Almost all respondents who gave an answer in percent said 100% of their stores would be interested in the product.

**Table 15: Percent of Stores Interested in Product**

Percent of Interested Stores	Count	%
5%	1	2.9%
18%	1	2.9%
25%	2	5.9%
100%	22	64.7%
Don't Know/Not Applicable	8	23.5%
Total	34	100.0%

They were then asked a follow-up question of “Are they currently stocking some meat products in particular stores but not in others?”

- Only 2 respondents (6%) stocked meat in particular stores but not others.

**Table 16: Currently Stocking Meat in Particular Stores**

	Count	%
Yes	2	5.9%
No	22	64.7%
No Response	10	29.4%
Total	34	100.0%

### 6. Willingness to Carry More Than One Beef Line or Brand in a Store

Respondents were asked, “Would they be willing to carry more than one beef line or brand in a store?” They were then given the choice of ‘yes’ or ‘no’.

- Almost  $\frac{3}{4}$  of respondents said they would be willing to carry more than one line of beef.

**Table 17: Willing to Carry 2+ Beef Brands**

	Count	%
Yes	24	72.7%
No	7	21.2%
Maybe	2	6.1%
Total	34	100.0%

### 7. Slotting Fees

Respondents were asked, “Are there slotting fees?” They were then given the choice of ‘yes’ or ‘no’.

- Only 2 respondents answered in the affirmative.

**Table 18: Slotting Fees**

	Count	%
Yes	2	5.9%
No	31	91.2%
Don't Know	1	2.9%
Total	34	100.0%

## E. Marketing and Pricing Issues

### 1. *Suggestions for moving product*

Respondents were asked “*Do you have any suggestions for moving product [i.e. inclusion of cooking directions, product linkage, support material [display material, advertising, counter material etc]?*” They then provided a verbatim response.

**Table 19: Suggestions for Moving Product**

<b>Suggestions</b>	<b>Count</b>	<b>%</b>
Cooking Directions	6	17.6%
Display Advertisement/Case Dividers	6	17.6%
Informational Packages	4	11.8%
Advertisement	3	8.8%
TV/Radio Marketing	3	8.8%
General Marketing	2	5.9%
Samples/Taste Testing Area	2	5.9%
None	8	23.5%
Total Responses	34	

- Cooking Directions and Display Advertisements/Case Dividers were the two most common suggestions for moving product (both suggested 6 times).

## 2. Particular Food Safety Issues and Product Wholesomeness Issues

Respondents were asked, “Are there particular food safety issues and product wholesomeness issues that need to be addressed?”

**Table 20: Particular Food Safety Issues and Product Wholesomeness Issues**

Issues	Count	%
Properly Inspected/Federally Inspected and Graded	6	17.6%
Minimum Bacteria Levels	3	8.8%
Safe Handling	3	8.8%
Standard Safety Issues	3	8.8%
Consistent Temperature	2	5.9%
Proper Glove Usage/Hair Nets	2	5.9%
Cleanliness	1	2.9%
HACCP Program	1	2.9%
Issues of Pre-Packed Meat	1	2.9%
Mad Cow, Foot and Mouth	1	2.9%
Make Sure It Isn't Old	1	2.9%
Need to be Put in Advertising	1	2.9%
No Irradiation in Product	1	2.9%
Quality	1	2.9%
Rotation of Product	1	2.9%
Safe Handling Labels	1	2.9%
Wholesome as Possible	1	2.9%
None	11	32.4%
Total Respondents	34	

- One-third of respondents had no food safety issues or product wholesomeness issues that need to be addressed.
- Making sure the meat was properly inspected and graded was a concern of 6 respondents (18%).
- Other than inspection issues, the responses are quite varied.

### 3. Pricing Structure Utilized in an “Ohio Born and Raised” Consortium

Respondents were asked “What pricing structure would they utilize in working with an ‘Ohio Born and Raised’ consortium?” They then provided a verbatim response.

**Table 21: Pricing Structure for “Ohio Born and Raised” Consortium**

Pricing Structure	Count	%
Competitive/Subject to Market	7	21.2%
Slightly Higher Than Market Price	4	12.1%
By pound	2	6.1%
Premium Pricing	2	6.1%
Add 3% to cost	1	3.0%
Add 10%	1	3.0%
25-30% mark up	1	3.0%
25-30% margin	1	3.0%
Categories-26-27% range	1	3.0%
30%	1	3.0%
30% on beef. Overhead is going up yet don't want to gauge customer.	1	3.0%
35% market	1	3.0%
40% mark-up	1	3.0%
You want cheap, its out there	1	3.0%
Standard case price, Wouldn't change	1	3.0%
Follow yellow sheet out of Chicago.	1	3.0%
Min \$7 per lb.	1	3.0%
A little higher, probably about \$.20/lbs.	1	3.0%
Would have to set that up with Giant Eagle.	1	3.0%
Depends on cost associated with value	1	3.0%
Depends	1	3.0%
N/A	1	3.0%
Total	33	100.0%

- Seventeen respondents said they would price the beef at a competitive to the market or slightly higher than market price.
- Few respondents said they would be willing to use a premium pricing structure.

#### 4. Value of Vitamin E Verification

**Table 22: Pay Extra for Vitamin E Verification**

	Count	%
Yes	21	61.8%
No	7	20.6%
Maybe	6	17.6%
Total	34	100.0%

Respondents were asked “*Would you be willing to pay \$.01 to .05 more per pound or product if the “Ohio Born and Raised” program could verify that an animal was fed Vitamin E at levels that are known to increase shelf life of product by 48 to 72 hours by preventing oxidation of the meat which causes it to turn dark (with no negative effect on eating quality or food safety)?*” They were then given the choice of ‘yes’ or ‘no’.

- Eighty percent responded ‘yes’ or ‘maybe’.

#### 5. Marketability of Lower Third of USDA Choice and Select Cuts Advertised with “Ohio Born and Raised” Label

**Table 23: Marketability of Lower Third of Cuts**

	Count	%
Very Marketable	5	17.9%
Somewhat Marketable	4	14.3%
No Difference	1	3.6%
Not Marketable	8	28.6%
Won't Carry Lower Grade	4	14.3%
Depends on Marketing	2	7.1%
Don't Know	4	14.3%
Total Responses	28	100.0%

Respondents were asked, “*How marketable would the lower third of USDA Choice and Select cuts advertised with the ‘Ohio Born and Raised’ label be relative to the upper two thirds of Choice cuts?*”

- Only 9 respondents thought the lower third would be either marketable or somewhat marketable.
- Twelve respondents (over 40%) said either they would not carry the lower grade or the lower third would not be marketable at all.

**Note:** Some respondents did not give responses for this question and have not been included in the count or percentage.

#### 6. Interest in Program If It Operated Through a Producer Cooperative

Respondents were asked “*Would they have more interest in a “Ohio Born and Raised” beef program if it operated through a producer cooperative that was integrated downstream into meat packing so that the program has vertical coordination from the farm of origin to the meat packer?*” and then given the choice of ‘yes’ or ‘no’.

**Table 24: Interest in Program with Cooperative**

	Count	%
Yes	20	58.8%
No	8	23.5%
Maybe	6	17.6%
Total	34	100.0%

- Almost 60% of respondents were interested in the program if it operated through a cooperative.

## 7. Other Trends that Could Hinder Development of “Ohio Born and Raised” Meat Purchase Program

Respondents were asked, “Are there other trends/initiatives in the meat buying process that could hinder the development of a ‘Ohio Born and Raised’ meat purchase program?” They then gave a verbatim response.

- Five respondents felt the program may be too expensive to be successful.
- Eleven respondents felt there were no trends that might hinder the development of the program.

~~Table 25: Trends That Might Hinder Program Development~~

Trend	Count	%
Too expensive	5	14.7%
Large Chains may be Slow to Adopt Program	3	8.8%
Pre-Packaged Meats	3	8.8%
Possible Safety Issues	2	5.9%
Others	7	20.6%
None	11	32.4%
Don't Know	3	8.8%
Total Responses	34	

## 8. Useful Trends for “Ohio Born and Raised” Meat Purchase Program

Respondents were asked, “Are there other trends or initiatives in the meat buying process that you are presently using or responding to that you would like to see incorporated in the development of a ‘Ohio Born and Raised’ meat purchase program (attempts to differentiate their beef product)?”

**Table 26: Useful Trends for ‘Ohio Born and Raised’ Meat Program**

Trend	Count	%
None	22	64.7%
Cut Meat Themselves	1	2.9%
More Promotion	1	2.9%
I Like No Hormones, Free Range Meat.	1	2.9%
Availability, Sides Or Back, Trim, O By O	1	2.9%
Cooking Techniques-People Won't Buy What They Don't Know How To Cook.	1	2.9%
People Want Something Quick- 5 Min. Steak. Recipes On Packages	1	2.9%
More Local Purchases	1	2.9%
Black Angus-Very Good. Needs to be addressed and informed that marbling Is important.	1	2.9%
Branding	1	2.9%
Angus Beef - Continue W/Ohio Beef	1	2.9%
1/7" Or Less Trim On Primals	1	2.9%
Don't Know	1	2.9%
Total	34	100.0%

- Respondents had a wide variety of responses with no themes throughout the responses.

## F. Final Customer Issues

### 1. Support of “Freshness” and “Guaranteed Tender”

Respondents were asked “Do you have suggestions on how to support the concept of ‘freshness’, or ‘guaranteed tender’?” Some respondents provided multiple responses.

**Table 27: Suggestions to Support the Concept of ‘Freshness’ and ‘Guaranteed Tender’**

<b>Suggestion</b>	<b>Count</b>	<b>%</b>
Money-Back Guarantee	4	11.8%
Good Advertising	3	8.8%
Proper Handling	2	5.9%
Call 800 Number	1	2.9%
Don't Use Select Meat	1	2.9%
Freeze Beef-Fresher	1	2.9%
Freshness- Key, All Eye Appeal	1	2.9%
Go From Packers And Learn From Them	1	2.9%
Good Marbled Products With Little Age	1	2.9%
Location	1	2.9%
Meat Has To Be Fresh And Tender	1	2.9%
Need To Know And Trust From Outside Agency. Needs Checks And Balances	1	2.9%
Type Of Thing	1	2.9%
Pack Date, Fat Content	1	2.9%
Signage, Putting Stickers On Packages	1	2.9%
Stress the kill dates-Needs to be fresh and not old. Put a kill date on packaging.	1	2.9%
Type of Beef It Is	1	2.9%
Want To Know How Long Can Keep Product, Customer Awareness	1	2.9%
N/A	1	2.9%
None	12	35.3%
<b>Total Respondents</b>	<b>34</b>	<b>100.0%</b>

- A money-back guarantee was the most frequent suggestion to support the concept of freshness; however, it was only suggested 4 times.

## 2. *Perceptions of Issues of Freshness From Final Customer Perspective*

Respondents were asked, “What are your perceptions of Issues of Freshness from Final Customer perspective?”

**Table 28: Perceptions of Issues of Freshness from a Final Customer Perspective**

Perception
Cut it right then
Cut should stay red for 4-5 days in fridge
First they look at it's price, then they look at the coloring/marbling
Fresh as you can without preservatives
Has to be Red and fresh color
How long the beef has been in his case
It's important
Look of it in case
Not a concern
Pull earlier, Make it look fresher
Service
Want a product that's fresh and has good eye appeal.
We had created enough of a nightmare with dairy products. Leave it to control at the store level.
The major chains will demand dating product, only because they will demand credit for manufacturers in return from out dated product, and usually get it.

- Respondents had a wide variety of responses to the question.

### a. *Time Since Harvest*

Respondents were asked, “Are they principally concerned with time since harvest?”

- Ten of 18 respondents (56%) said customers are principally concerned with times since harvest in relationship to freshness.

**Table 29: Role of Time Since Harvest in Freshness**

	Count	%
Yes	10	29.4%
No	8	23.5%
No Response	16	47.1%
Total	34	100.0%

### b. *Need For No Preservatives*

Respondents were asked “Or is it that freshness implies a need for no preservative?”

- Twenty-one respondents said that freshness implies a need for no preservatives.

**Table 30: Role of Preservatives in Freshness**

	Count	%
Yes	21	61.8%
No	6	17.6%
No Response	7	20.6%
Total	34	100.0%

c. *Coloring*

Respondents were asked, “Does it primarily have to do with appearance in terms of brightness of red color, not redness (Dark red is bad, bright, cherry red is good)?”

- All respondents who answered said coloring is an important part of freshness.

**Table 31: Role of Coloring in Freshness**

	Count	%
Yes	26	76.5%
No	0	0.0%
No Response	8	23.5%
Total	34	100.0%

d. *Marbling vs. Subcutaneous Fat*

Respondents were then asked “Or is it associated with marbling vs. subcutaneous fat for leanness?”

- Sixteen of the 26 valid responses said marbling is associated with freshness.
- Three said customers don’t understand what marbling means. One respondent said, “I know marbling is good, and so do some people (very few), but the consumer buys with their eyes. Nine out of 10 will buy lean over fat regardless of quality standards.”

**Table 32: Role of Marbling vs. Subcutaneous Fat in Freshness**

	Count	%
Associated w/ Marbling	16	47.1%
Associated w/ Subcutaneous Fat	7	20.6%
Customers don't understand what marbling means	3	8.8%
No Response	8	23.5%
Total	34	100.0%

### 3. Possible Affinity Products to Market with “Ohio Born and Raised” Program

Respondents were asked, “*What sort of affinity products (like special spices and sauces) would you view as appropriate to market with a ‘Ohio Born and Raised’ meat purchase program.*” Multiple responses were given for this question.

**Table 33: Possible Affinity Products**

Product	Count	%
Marinates	7	20.6%
Seasonings/Spices	5	14.7%
Grilling sauces	3	8.8%
Garlic and pepper	2	5.9%
Meat rubs	2	5.9%
All	1	2.9%
Corn Beef, Pastrami, Beef Bologna, Beef Sausage, Beef Jerky	1	2.9%
Grilling to Exotic Stir-fry w/ Ohio Beef	1	2.9%
Lemon pepper	1	2.9%
Anything unique to Ohio: Ohio tomatoes, cooked with "Ohio Valley Vidal Wine" "Steak sauce with Ohio raspberries"	1	2.9%
None	11	32.4%
Don't Know	5	14.7%
Total Respondents	34	

- A plurality of respondents thought no affinity product would be appropriate (11 respondents, 32%).
- Marinates and Seasonings/Spices were the most common suggestions for affinity products (7 respondents, 5 respondents).

#### 4. *Expectations of Meat Buyers in Joint or Shared Advertising*

Respondents were asked “*What expectations would meat buyers have about joint or shared advertising, nature of packaging, etc?”*

**Table 34: Expectations of Meat Buyers in Joint or Shared Advertising**

Expectation	Count	%
Joint Advertising Would Be Helpful	7	20.6%
Ad Money	1	2.9%
Bigger Stores in Favor. But Smaller Store Don't Have Resources	1	2.9%
Good Advertising in Quality Amount	1	2.9%
Help Marketing	1	2.9%
I buy a lot of hanging beef. It's the way the trends. It's hard to compare with chain stores.	1	2.9%
It Might Work	1	2.9%
Keep It Separate in Ohio	1	2.9%
Looking to Carry Something Unique-Private Label What They Are Doing	1	2.9%
Most Independents Work Together	1	2.9%
Ohio Pride-Should Have a Program Like OMI	1	2.9%
Package or Support of the Store, Via Promotion of Ohio Raised is Sold at Such and Such Market	1	2.9%
Paying Into Check-Offs. Get Money Back For Production	1	2.9%
Pre-Packed-Want to Know if Frozen, Fresh, Salt Content, When Harvested, Ingredients.	1	2.9%
They'd Be Scared. Ohio Born Would Be Sketchy. We Need Support	1	2.9%
No Interest	8	23.5%
Don't Know	5	14.7%
Total	34	100.0%

- Only 8 respondents had no interest in shared advertising.
- Twenty-one respondents had an at least somewhat positive view of joint advertising.

### 5. “Natural” or “Organic” Business

Respondents were asked, “What percent of business is currently ‘Natural’ or ‘Organic’?”

- Fourteen respondents said only a small percentage (less than 3%) was natural or organic.
- Most answers were either at one extreme or the other; no respondents said that their business was in the range of 16% to 69% organic.

**Table 35: Percent of Business that is Natural or Organic**

	Count	%
0%	7	23.3%
0%-1/2 of 1%	1	3.3%
1/4 of 1%	1	3.3%
2%	1	3.3%
3%	1	3.3%
10%	2	6.7%
15%	1	3.3%
70%	2	6.7%
75%	1	3.3%
70-80%	1	3.3%
100%	5	16.7%
Only Chicken	2	6.7%
Small Percent (Unspecified)	3	10.0%
Don't Know	2	6.7%
Total	30	100.0%

As a follow-up question, they were asked “How wedded are they to these current out of state suppliers of these products?”

- Only 3 of 15 respondents said they were definitely wedded or pretty wedded to an out of state supplier.

**Table 36: Wedded to Out of State Suppliers**

	Count	%
Definitely Wedded	1	6.7%
Pretty Wedded	2	13.3%
Somewhat Wedded	2	13.3%
Not Wedded	6	40.0%
Don't Use Out-of-State Suppliers	4	26.7%
Total Responses	15	100.0%

## 6. Price Premium for “Ohio Born and Raised” Beef

Respondents were asked “If food safety concerns were addressed and quality criteria were addressed, do you feel that any premium would be warranted for ‘Ohio Born and Raised’ beef over the price of commodity beef, and if so, what percentage?”

**Table 36: Price Premium for “Ohio Born and Raised” Beef**

Amount	Count	%
\$.01 to \$.02 a pound	1	3.0%
\$.01 to \$.05 a pound	3	9.1%
\$.05 to \$.10 a pound.	1	3.0%
1-2%	1	3.0%
2%	1	3.0%
2-3%	2	6.1%
3-5%	2	6.1%
5%	3	9.1%
10%	2	6.1%
10-15%	1	3.0%
10-20%	1	3.0%
20%	2	6.1%
25%	1	3.0%
70%	1	3.0%
No Percentage at First; If the Program Worked, Then a Percentage.	2	6.1%
None	4	12.1%
Should Have A Premium. (Amount Not Specified)	2	6.1%
Don't Know	3	9.1%
Total	33	100.0%

- Only 8 of the 33 respondents mentioned a percentage of 10% or more.
- Fourteen respondents (42%) mentioned a premium of less than 5% or less than \$.10 per pound.

## **G. Refusal Section**

Only the respondent who had no interest in the “Ohio Born and Raised” beef program was asked these questions.

### ***1. Reasons for Lack of Interest***

The respondent was asked, “*What are the reasons you would have no interest in the ‘Ohio Born and Raised’ beef marketing concept?*”

And answered:

- Tight grading standards. If it were all Angus-Ohio beef, that would be great. Might approach packers.

### ***2. Information Needed to Consider Starting a Pilot Program***

The respondent was asked, “*What information would they need to consider starting a pilot program of ‘Ohio Born and Raised’?*”

And answered:

- Need to know grading standards and how they compare/are the same as Angus.

### III. APPENDIX

The following appendix contains verbatim responses to all the questions

**Table A1: Main Forces Driving and Impacting Meat Purchasing Decisions**

---

#1- Availability. Proper grade. USDA quality. Proper yield-Y2. Weight range- six weight cow 600-660
A central warehouse.
All natural, No hormones and steroid use, Choice beef yield 1 or 2
Although I do believe that in today's meat market, your profits are made on purchasing side of the business, business and purchasing is still always been driven by sales which is a result of consumer demand (I can make a heck of a profit on a smart purchase of beef loins for a promotion, but if the consumer are not in the mood to spend this week your profits are left in the boxes stacked against the walls of your cooler.) When economy is bustling and traffic at your store is consistent, life is good.
Availability and location
Branded beef program, Use cert. Angus, Project standards, 1-7 committed to product
Consumer buying
Consumer demands
Customer Preference
Customer interest, raised locally
Customers
Customers
Customers, Price
Depends on time of the year and weather
Freshness and Price Quality
Freshness, Know where its coming from
Move ability (customers preference, pricing, quality)
Order strictly through warehouse, chicken from local packer in Ohio, Parkfarms
Price and Quality
Price and Quality
Price, Time of year
Price, USDA choice
Quality and cost. Stick with a company that is loyal and diversity
Quality and price
Quality and Price
Quality and Price, Service of the supplier, being able to give me the products I want and when they say they will deliver
Quality, Freshness- Buy all local
Quality, Grade, Price
Quality, Packer reputation, cost
Quality, Pricing, Service
Quality/Pricing- of choice beef deliveries and schedule
Quality-Grade/Prime grade, all natural no hormone/steroid or antibiotics, raising protocol, whole process verified
Tenderness, Freshness, Grade- lean, black Angus
Top quality, Best available
What they want

---

**Table A2: Key Characteristics Looked For In Meat Suppliers**


---

#1 - Trust Relationships - The meat business can be dirty. #2 Pricing and availability - always important. We can work most everything out

Availability, Quality

Availability, the quality, supply my needs at a competitive rate, loyalty

Bring what's ordered, demand. Inspection, cattle yield grade.

Cleanliness of trucks, Prompt delivery, Price

Consistency, Pricing, and Quality

Convenient, getting shipped ASAP, new meat

Dependability, Price and Quality

Eating consistency, taste, tenderness, and juiciness. Tight grading program.

Follow HACCP program, needs to be gov't graded

Freshness, Service, Pricing

Grade of meat can get any kind you want

High Quality, Low Prices

Honesty and Timely fashion

Honesty, competitive price, Freshness

Honesty, integrity, being able to work with him

Make sure they have supply needed. -Constant quality, marbling, grade

On time arrival, Quality-rotation, Fill rate

On time orders

Pricing, Quality, Freshness, Delivery, Schedule

Product

Quality

Quality - cutting standards of the fat, handling of the meat - and pricing

Quality- get us top quality, Availability

Quality of product, Freshness, promptness with their customers

Quality of products, How and when it comes in, Prices

Quality, Service, Pricing

Reliability

Reliability- have what we want, quality, convenience

Reputable source, back up claims they make all important

Sales rep, Knowledge, Price, Fresh

Same one for a long time, honesty of business.

The quality of meat

The warehouse - quality of product availability

We buy from warehouse.

---

**Table A3: Respondents Purchasing More Than One Brand of Beef From A Supplier**


---

No
No
No
No
No
No-Supply our own
Yes
Yes
Yes
Yes
Yes - already does
Yes - Always! The industry has always maintained parity
Yes - but try to stick with brand program
Yes - does right now
Yes - For comparison between products to see which is better
Yes - I have 10 suppliers. Different prices. I pick the best.
Yes - They already do
Yes - We like Ohio pride products
Yes - when it comes to boxed beef
Yes (Grade is important not brand)
Yes- Angus or choice from one supplier
Yes- Boils down to quality, service, and pricing
Yes- Depending on quality and price better grade
Yes- Different sizes of meat
Yes- He purchase different grades of beef
Yes- IBP
Yes- If they have more than one Maple leaf, IBP, Excell, ConAgra's-Whatever they send
Yes- Its good for competition
Yes- Price
Yes- Some grades are better for steaks and others for ground beef
Yes- Types of different grade, or different brand names
Yes- We get what's available. Excell, IBP, Beef America, Box cattle
Yes-IBP Excel National Beef
Yes-If we can use 100% cert. Angus
Yes-Stock, best pricing

---

**Table A5: Information Needed to Consider Starting a Pilot Program of “Ohio Born and Raised”**

A pilot program needs every piece in place to succeed. The consumer needs to feel good about: Value - costs need to be close to what the consumer is comfortable with. Safety - It has to be a safer product for the future of their families. Taste - He assumes it will be quality product and it better be.

Already have one established

Any kind of pts of sales, flyers, chemicals

Back it up with sale material advertising on TV to promote need to know pricing and availability - where do you get it?

Don't know. Would need information about the program.

Don't need any, already doing it. Consumer readable - pass onto customer

Entails who else will carry

ER Balance-meat supplier

Grade of Beef, Quality would be like and how gullible it is

How much inspectors will bug us

I am doing it already. The Ohio Proud Stamp- the best. Open to things

Info about program- must give to store owner

Ohio Proud Program-Which companies supplies

Origin, Gov't grading, Product availability, Price

Price and Quality

Pricing, Grading and quality, Support ad programs

Product selection, quantities, pricing, raising protocols- and documenting, who is doing process, and distribution

Quality and what it's graded as

Quality, consistency, and price

Quality, Cost, Availability

Quality, Pricing

Quality-documentation of feeding

Source and Process verification

They would be verified Ohio Beef. Not the process verification, just the source verification.

Type of beef, how it is fed, and pricing

We'd need a supplier to set the meat to Giant Eagle Warehouse

We've got a program going

What kind of beef, Quality, What are they feeding, natural feeding

What type of beef their using how long they are feeding it for consistency

Whatever info. How its taken care of, harvest process, how its fed, quality

When, how, and what form (box or hanging quarters) then they process it. How they would deliver. When they could deliver.

Who is going to be starting the program

Whose delivering, handling it - local company

Would meet quality standards

**Table A6: Influence of In-Store Marketing Materials**

---

Absolutely, but they cost money - which will have to be chalked up towards the future success... You have to spend money to make money and sometimes you just can't pass it along to the consumer right away.

Already have displays

Already use Ohio Beef

Any support would be great factor in decide to do the campaign. I.e., support of marketing material

Huge influence, Been doing this for 40 years

It would be nice to have

It would help it move. Would greatly appreciate that.

Maybe

No, But it would be an asset

No. No case dividers in store

Not really

Somewhat most lit is thrown away at home. Might help a little.

Sure. It would help

Would help

Would help selling in store

Wouldn't influence, but help

Yes

Yes

Yes

Yes

Yes

Yes

Yes

Yes

Yes

Yes

Yes

Yes - help to get word out to public needs the basic info to customers

Yes it would

Yes it would

Yes, any kind of marketing is good

Yes, it helps. Put an effort into the product

Yes. You need those items

Yes. Somewhat. We have stickers

---

**Table A7: Standards Needed for “Ohio Born and Raised” Beef**


---

All be choice meat, box it, guarantee availability
Amount of fat, Date packaged
Amount of time on feed in Ohio, Quality of grade
At least select grade prefer choice
Best quality
Choice of prime
Choice or higher quality
Choice, good color
Choice, Grain fed
Competitive price and availability
Consistent program, quality, color, texture
Credibility / trust of people who set up program. People who promote program. Feed that is given to animals
Fat quality, Texture- tough or tender
Grade out, Yield factor-2, Weight range 600-660
Have to be choice grade 2 or higher. Quarter inch beef trim standard.
High grade/ high quality, prime grade- high choice, antibiotic free, feed be proven all vegetarian feed
Highest quality, gov't inspected, quality and grade
How are they fed- organic, Have no substitute grains
Leaner beef with marbling, not a lot
Low price, Availability
No less than choice
Nothing less than choice beef, angus beef
People feel comfortable and trust good neighbors and family members. We need to pass that feeling along to the Ohio consumer that she feels she knows where, who, what, and when her beef is coming from. Standards would have to include a consortium of quality members with reasonable guidelines to meet. But our consumer won't budge unless there is something much better for their families. Such as healthy reduced growth stimulants, antibiotics, implants...
Prime beef, not choice
Quality - look, cut ability, customer preferences
Quality choice standards higher grade beef
Same standards as other meat
Select and choice- Good grade and yield, fresh, price
The highest of quality, Inspection and grade on choice, Reasonable cost, availability. Tough competition but provide a good product should have no problem.
The highest standard. The USDA standards, I would want to meet those standards.
Upper end of choice grade
Uses Ohio beef
Wholesome, Government regulated, consistent tenderness
Would have to be tip choice and prime grades. Need to have standard in order to meet inspection needs.

---

**Table A9a: Other Essential Standards In Order to Consider "Ohio Born and Raised" Beef for Purchase**


---

All important  
 All of that  
 All of them  
 Availability from time ordered, How many times a week, Customer satisfaction  
 Availability of it, how long it would take to get it  
 Availability of meat  
 Can't think of any  
 Consistency on product 800#  
 Covers it  
 Covers it all  
 Distribution - who would bring it to the market  
 Don't Know  
 He wants swinging meat, not boxed meat  
 How they are fed  
 If there were organic standards  
 More on source verification. The name you have chosen "Ohio Born and Raised" immediately brings to mind "source". And what makes Ohio's sources "better" or "different" I say because Ohio's sources are "Healthier" perception in truth is that if our children eat this I...  
 No  
 No  
 No  
 No  
 None  
 None  
 None  
 None really  
 Not  
 Price, Availability  
 Pricing  
 Proper weight and yield grade, Breed of cattle  
 Quality control  
 Quality, consistency, as well as price  
 Standard Stuff  
 State how many days in state what and where (region) they've been fed  
 You covered all the standards

---

**Table A10a: Reason Why for Preferred Form of Products**


---

Boxed Product, wholesale cuts - This is for me. And they have to conform to the standards the major packers have established. Halves or quarters (carcasses) - I have great experienced meat cutters. Most markets don't and would have a problem with carcass beef. But let me tell you, there is no value in carcass purchasing today. The major packer has made it much easier to buy and sell with box beef. I can buy just what I need.

---

**Table A19: Suggestions for Moving Product**


---

A lot of marketing. All of the examples, the more the better
Ad fees, Aggressive pricing
Advertisement
Advertisement
Advertisement - Dividers
Advertising and promotions on TV and radio. Hold seminar to explain program
Cooking directions, Recipes, Promised prime, No antibiotics
Figure out consumer and you can move anything. Display
Freshness, Quality, Ohio beef supports Ohio people
How long to cook meat, Pamphlets for cooking ideas
If I did I'd be rich. Get on TV. That Ohio beef is important. TV marketing
Informational packages, Demos-set up a taste testing area
More you can provide the store, the better. More info about product, cooking differences.
No
No
No
No
No
No
Nope
Not really - brochures, posters
Nutritional info., Product benefits
Ohio based processors receive pay-offs
P.O.P. - case dividers. Full service counter - display case
Promote freshness
Promotion on TV from other than retailers
Recipes always good. In-case signs. Notes saying Ohio Beef and Recipe case dividers.
Safe handling
Talk to customers, word of mouth, samples
Using all materials of promotion available - sell the product as an affordable variety package. Frozen for their convenience, such as package #1: 5 T-Bones, 5 Rib eyes, 10 Sirloin patties, 4 Sterling tips, 10 Beef patties, 1 Rump Roast, 10 ground chuck, 4 pepper steaks, 4 pigs cubed steak - Individually frozen all for \$79.00
Very Important. Cooking instruction go very well
We don't have products turn. We cook it down to deli.
Would be a necessity

---

**Table A20: Particular Food Safety Issues and Product Wholesomeness Issues**


---

All safety issues - needs to be safe and have guarantees.
As long as its processed by law
Bacterial level needs to be at a minimum
Basic everything needs to be inspected and quality
Cleanliness
Competition from NB and Kansas. How do they take care of pre-pack meat?
Every food safety measure, especially bacteria.
Federally inspected and graded
For me this is the issue or why would I need to change from what I currently buy. Consumer asks, what I currently buy is fresh, tender, tasty, convenient, but is it safe?
HACCP program, Controlled temperatures
If boxed - needs to be state/federally inspected
Mad cow, foot and mouth
Make sure it isn't old - not acceptable
Need to be put in advertising
No
No
No
No
No
No, We freeze our beef
No. Federal Inspection
None
Not really, just standard
Not that I can think of. I've had no problem.
Not that I can think of. Wearing gloves, hair nets
Programs, No irradiation in product.
Property inspected
Quality, cut down bacteria
Safe handling labels, Consistent temp, Rotation of product
Safe handling, no washing gloves - so wash and change gloves
Standard government regulated issues
States doing fine
Want to be as wholesome as possible
Yes - safe handling

---

**Table A21: Pricing Structure for "Ohio Born and Raised" Consortium**


---

25 - 30% margin
25-30% mark up
30%
30% on beef. Overhead is going up, don't want to gauge customer.
35% market
40% mark-up
A little higher
A little higher, probably about \$.20/lbs.
Add 10%
Add 3% to cost
By pound
By the lb.
Cannot be more than others competitive pricing
Categories- 26-27% range
Comparable to what else he buys
Competitive pricing
Cost more- Keep competitive
Depending on cost to me, but keep it close to other products, but a bit higher
Depending on market price
Depends
Depends on cost associated with value
Depends on market, Subject to market
Follow yellow sheet out of Chicago.
Have to be competitive
It has to be close to market pricing. We can't afford to give up our margins. Meat depts. are always struggling for more. Possibly all members can pay a small fee that can be used to offset some of the promotional money.
Market price of beef
Min \$7 per lb.
N/A
Premium pricing
Standard case price, Wouldn't change
Stay with in norm of competition
Top choice. Its special
Would have to set that up with Giant Eagle.
You want cheap, its out there

---

**Table A22: Pay Extra for Vitamin E Verification**

---

Maybe
Maybe
No
No
No
No
No
No
No - People don't trust anything fed or injected into animals today. Let's not go backwards, this would interest any Meat Merchandisers, but not publicly.
No-Depends on quality. Questionable
Possibly. Would look into it
Yes
Yes
Yes
Yes
Yes
Yes
Yes
Yes
Yes
Yes
Yes
Yes
Yes
Yes
Yes
Yes
Yes
Yes
Yes - See it to believe it.
Yes- \$0.01
Yes- I don't know if it works. I'd be a little scared
Yes- Possible
Yes-but absolutely no effects

---

**Table A23: Marketability of Lower Third of Cuts**

---

33% marketable  
Depends on price, quality  
Do not care for that  
Doesn't make a difference  
Don't deal with lower grade.  
Give assurance of good product  
Hard to tell  
I don't know  
I don't know  
More of select be marketable  
More people want to select. Tenderness is better  
More people would buy "Ohio"- if in Ohio  
No interest in product lower than choice or prime  
No problem - the upper 2/3 belongs to restaurants  
No too Marketable  
No, has to be lean.  
None  
Not  
Not much  
Not much relevance- same grade  
Not Well  
Pretty marketable in area  
Promotional Thing  
Quite relative  
Real good. We have select and sales have gone up 4%  
Select cuts won't sell, People want marbling  
Sell More  
Some what  
The upper 2/3 would be a better market than the 1/3 of the bottom  
Very important to be marketed  
Very marketable  
Wouldn't carry lower  
Wouldn't use lower third, only choice and higher beef  
Yes

---

**Table A24: Interest in Program with a Cooperative**

---

Doesn't know
Doesn't make as big a deal
Doesn't matter to him, just needs a guarantee to costumers from where it comes from
Don't know
I think people running businesses should work together. Quality
Maybe
No
No
No
No
No
No
No - Don't know what this is talking about, needs to be in Ohio.
No- hard to answer. Have to give packer incentives
Yes
Yes
Yes
Yes
Yes
Yes
Yes
Yes
Yes
Yes
Yes
Yes
Yes
Yes
Yes
Yes
Yes
Yes
Yes
Yes
Yes Absolutely
Yes- Add jobs

---

**Table A25: Trends That Might Hinder Program Development**


---

Advice on program and follow it up, control frauds from butcher
Bad press especially overseas. If it happens here it carries over by media
Compare with price
Cost - already buys local beef so has to compete with them and those local companies
Didn't think so
Don't Know
Don't Know
Giant Eagle might not be inclined since they are in PA, but now have many Ohio Stores.
Home replacement meals
I'm sure there certainly may be. But this pertains to the mega chains mostly. You will ultimately reach the attention of the major stores brass only after its proven though the small means channel. This is how it has worked forever. I am forever looking for a new niche market and we are fully aware if it is successful that niche will be adopted by the large chains only after it is proven and in demand.
Millions. Not getting into it. Its not for everybody
N/A
Need to promote it more - work with independents
No
No
No
No
No
No
No
No case study
None
Not necessary, Maybe need case ready
Not really
Not really maybe pre-packaged meats
Not.
Only if something bad happened in bacterial counts.
Policing would be important
Pre-packaged trends. Always new beef in ads.
Too expensive
Too many people already involved in programs at moment
When they start radiation of beef
Yeah. Cost of increase could be 1-5 cents
Yes. That beef is no good for us

---

**Table A26: Useful Trends for “Ohio Born and Raised” Meat Program**

---

Not really cut meat themselves.  
Not really may promote more  
No  
Not really  
Not really  
Not on hand  
I like no hormones, free-range meat.  
No  
Not really. Availability, sides or back, trim, o by o  
I don't know  
Not using any  
Nah  
No  
Not really  
No  
No  
Cooking techniques won't buy what they don't know how to cook  
People want something quick- 5 min. steak. Recipes on packages  
More local purchases  
Black Angus - Very good. Needs to be addressed and informed that marbling is important.  
No  
Not really  
1/7" or less trim on primals  
No  
No  
Branding  
None  
No  
Angus beef - continue w/ Ohio beef  
No  
No  
No  
No  
No.

---

**Table A27: Suggestions to Support the Concept of "Freshness" or "Guaranteed Tender"**


---

Can't guarantee tender - No animal is perfect. 30 months old or less when processed
Don't use select meat
Freeze beef- fresher
Freshness- key, All eye appeal
Go from packers and learn from them
Good advertising, More money towards advertising
Good marbled products with little age
Guarantee- money back
I personally don't know how you can back this up. As a retailer I can attest to a growing problem of consumer handling after the purchase that is less than favorable. If a consumer leaves it in her car for four hours while running errands, she doesn't understand why it's not fresh two days later. Or the problem with well done loaves over cooking meat and wondering why it isn't tender. Beware.
Location
Money back guarantee
Money back guarantee or call 800 #
N/A
Need to know and trust from outside agency. Needs checks and balances type of thing
No
No
No
No
No
No
No
None
Not Really
Of course meat has to be fresh and tender
Pack date, Fat content
Proper handling
Retailers-double-back guarantee
Show truck from Nebraska stuck in a snowstorm w/ pre-packaged meat.
Signage, putting stickers on packages
Stress the kill dates - needs to be fresh and not old. Should have a kill date on packaging.
Through advertisement and producer signage and media advertisement by producers
Via paper or news ad, Cattleman's commercial, Advertise wholesomeness, Campaign
Want to know how long can keep product, Customer awareness
Way its handled, type of beef it is

---

**Table A28: Perceptions of Issues of Freshness from a Final Customer Perspective**

---

Buy Aged
Cut it right then
Cut should stay red for 4-5 days in fridge
First they look at it's price, then they look at the coloring/marbling
Fresh as you can without preservatives
Has to be Red and fresh color
How long the beef has been in his case
Its important
Look of it in case
No
No
No
No
No
No. Just freshness based on looks.
Not a concern
Not for beef, more about appearance
Pull earlier-Make it look Fresher
Service
They are concerned with harvest time
Time since harvest is freshness
True
Want a product that's fresh and has good eye appeal.
We had created enough of a nightmare with dairy products. Leave it to control at the store level. The major chains will demand dating product, only because they will demand credit for manufacturers in return from out dated product, and usually get it.
Yeah, its important
Yes
Yes
Yes
Yes
Yes
Yes. Less time is the best

---

**Table A30: Role of Preservatives in Freshness**

---

Correct

If you sell it, no preservations

Like to see it with no preservative

No

No

No

No preservatives

No preservatives

No preservatives

No preservatives

No Preservatives

No Preservatives

No preservatives, no antibiotics

No, freshness implies proper handling from all of us including the consumer

No. Freshness is not being frozen than thawed

Not Really

Yes

Yes

Yes

Yes

Yes

Yes

Yes

Yes

Yes- No preservatives

Yes with meat

You don't want preservatives

---

**Table A31: Role of Coloring in Freshness**

---

Better if it looks good and red.  
Brightness is very important  
Brightness of red color  
Cherry red is good  
Color is prime  
Correct  
Frozen is dark  
Has a lot to do with customers  
Has to have bright red color  
Meat had to bloom, keep the bloom up.  
Most important  
Not a lot of dark color meat  
Too fresh- eye appeal, but not tender  
Yeah  
Yes  
Yes  
Yes  
Yes  
Yes  
Yes  
Yes  
Yes  
Yes  
Yes- bright red  
Yes- red color  
Yes. Up to store level.

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**Table A32: Role of Marbling vs. Subcutaneous Fat in Freshness**

---

80% look for leanness
Associated with marbling
Customers don't understand what marbling means
Have to have some marbling
I know marbling is good, and so do some people (very few), but the consumer buys with their eyes. 9 out of 10 will but lean over fat regardless of quality standards. Our grading has been overplayed by markets.
Leanness
Marbling
Marbling
Marbling associated
Marbling associated
Marbling associated
Marbling is best, but depends on cattle; cherry red isn't always the best. Marbling is best for taste
Marbling more association
More Marbling
No
No
No, with the freshness
People like lean beef, but you have to have some marbling
Prefer marbling
Shoppers look for color, not many understand preservatives, marbling or time of harvest
Steaks marble
Subcutaneous fat for leanness
Yes
Yes
Yes
Yes

---

**Table A33: Possible Affinity Products**


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All
Any type of spice or flavor profile
Anything unique to Ohio: Ohio tomatoes, cooked with "Ohio Valley Vidal Wine" "Steak sauce with Ohio raspberries"
Corn beef, Pastrami, Beef bologna, Beef sausage, Beef jerky, Add value to lower price cuts
Don't know
Don't know, shouldn't have to use affinity products
Dry seasoning, no sauces
Focus more on flavor of meat and not enhancement
Garlic and pepper
Grilling sauces and marinades
Grilling to exotic stir-fry w/ Ohio beef
I don't use any
I have no idea
I wouldn't sell any
Lemon pepper, Garlic and pepper
Marinade with roast. Pueblo Brown. Burgundy with Turkey.
Marinades and recipes with a list of spices. Have a wide variety, depends on ethnic climate of market area
Marinated, Advertising-let meat speak for itself
Marinates
Meat rubs, Marinates
N/A
N/A
No idea
None
None if its good you don't need that
None, shouldn't have to have it. Maybe just garlic.
Not interested in spices
Not into that-don't sell affinity products
Nothing Special
Seasonings
Spices and sauces
We don't use them
We have meat rubs and BBQ sauces. Not important
We have our own seasoning. Low in salt.

---

**Table A34: Expectations of Meat Buyers About Joint or Shared Advertising**


---

Ad money
Bigger stores in favor. But smaller store don't have resources
Do it jointly its costly for one person
Don't know
Don't think they would do it
Good advertising in quality amount
Help marketing
I buy a lot of hanging beef. It's the way the trends. It's hard to compare with chain stores.
I would welcome it
Interested in talking about it. Would participate.
It might work
Keep it separate in Ohio
Looking to carry something unique- Private label what they are doing
Most independents work together
N/A
N/A
No interest
None
Not interested
Not interested
Not interested in advertising
Ohio pride- Should have a program like OMI
Package or support of the store, via promotion of Ohio Raised is sold at such and such market
Paying into check-offs. Get money back for production
Pre-packed- want to know if frozen, fresh, salt content, when harvested, ingredients.
Shared advertising isn't bad
Shared advertising-good concept. Ohio Proud Programs. Quality assurance
That appeals to him
That would be great for advising as long as it wasn't a higher cost to me
They'd be scared. Ohio born would be sketchy. We need support
Very cooperative
We don't advertise
We wouldn't want to share in advertisement.

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**Table A35, A36: Percent of Business that is Natural or Organic/Wedded to Out of State Suppliers**


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1/4 of a %
10% Natural
10%, Not really
100%
100% natural, Don't buy meat outside
100% No out of state
100%- pretty committed. Buy 80% of beef out of state
15%, all suppliers are in state. Not wedded.
3%- Not committed to anyone
70% Not committed
70%- not interested
70-80%- 1 out of state supplier
75%
All is natural - nothing out of state
Def. Wedded - Like what we carry
Limited amount of organic, not wedded at all
No - natural or organic, no
No idea
No information
None
None
None- 1/2
None is organic
None. Don't promise. No out of state suppliers
None. I don't care where they come from.
Not wedded, don't have be
Only chicken
Only chicken is natural
Only one store
Small percent. Pretty committed
Stay away from organic-these people are too granola! "Natural" is overused and overrated. We want assurance, the same assurance you feel with friends
Very little 2%
Very low %
We ship bratwurst. Use natural coating. Somewhat committed

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**Table A36: Price Premium for "Ohio Born and Raised" Beef**


---

\$.01 to \$.05 a pound
\$.01 to \$.05 a pound
10%
10-15%
10-20%
1-2%
1-5 Cents
2 or 3 %
2%
20%
20%- Some kind of premium. To show its worth it.
2-3 % more
25%
3-5%
3-5% increase, not much
5%
5%
5%
70%
As long as it was maintained between 1 - 2 cents
Can't put a percentage
I don't know
Like angus - Usually .05 - .10 cents more per lb.
No
No
No answer
No issue here
No percentage because his people expect it. If the program worked then you can raise percentage.
No premium just because its Ohio
Not for tax on home-grown meat
Should have premium. Don't know a percentage.
Small percentage 10%
Yes
Yes, but in time. When demand has been created all premiums will have no problem being met. A pilot program is a beginning. Let's not shoot ourselves in the foot permanently. We have included in a Chianina lean breed pilot program that cost 10-15% more than USDA Choice. Consumers remarks were "Looks the same, tastes the same, but it's a \$1 more a pound, no thanks." But if we can attach safety and quality statements to a product that looks like what they are currently buying and costs the same, No Brainer! We got to try it.

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